



Identifying SOAR Applicants

This tool is intended to help case managers identify adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits. While we do not want to discourage anyone from applying for SSA benefits, this tool should help you identify individuals that most need your assistance with their application.

Initial SOAR Criteria: *The following identifies individuals eligible for SOAR.*

- ☐ Applicant is under 65 years old and has difficulty maintaining employment due to disabling conditions
- ☐ Applicant is over 65 years old with low income and resources and/or potentially eligible for retirement benefits based on work history
- ☐ Applicant is 18 years of age or older or within one month (90 days for youth who are aging out of the foster care system) of their 18th birthday

And meets one of the following based on the [Definitions of Homelessness used by SOAR and SSA](#):

- ☐ Applicant is homeless **or**
- ☐ Applicant is at imminent risk for homelessness

If applicant answers yes to either statement below, have applicant sign the 3288 (Consent for Release of Information) form and fax to the SOAR contact at your local SSA office. This allows you to obtain the SSA status of the applicant to verify the applicant does not have an open case.

- ☐ Has applicant received SSI/SSDI in the past?
- ☐ Has applicant spoken with someone about applying for benefits?

SOAR Fundamentals: *The following 4 characteristics represent key eligibility criteria for SSA disability benefits*

- ☐ Applicant has a serious mental illness or exhibits symptoms and/OR has serious physical illnesses that affect his/her ability to work at a substantial gainful level (\$1,130/month in 2016)
- ☐ The illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- ☐ Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment. For example:
 - Psychotic Symptoms (positive or negative)
 - Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
 - Manic Symptoms (racing thoughts, disorganized thoughts)
 - Anxious feelings (paranoia, nervousness)
 - Cognitive deficits (brain injury; problems with concentration, memory, etc.)
 - History of trauma (history of abuse, post-traumatic stress disorder, etc.)
 - Other: _____
- ☐ For applicants with mental illness, he/she has marked restrictions in at least 2 of these functional areas:
 - Activities of daily living (personal hygiene, cooking, cleaning, transportation, etc.)
 - Social functioning (getting along with others, anger, avoidance, etc.)
 - Concentration, persistence and pace (as they relate to the ability to complete tasks)
 - Repeated episodes of decompensation (hospitalizations, incarcerations, losing jobs/housing, etc.)



SOAR Recommends: *The following characteristics are not essential, but may strengthen an application*

- ☐ Applicant is prescribed psychiatric medications and continues to experience symptoms and functional impairments
- ☐ Applicant has obtainable medical evidence (for at least part of the past 12 months) that corroborates mental illness and medical complaints. If no medical evidence or large gaps in treatment:
 - Applicant clearly exhibiting symptoms severe enough that a one-time examination by a physician would demonstrate issues
 - Can write a medical summary report that details symptoms and functional impairments that demonstrates diagnosed disability
- ☐ Applicant is not working due to medical and/or psychiatric conditions (i.e. not because he/she cannot find work or was laid off)
 - History of failed work attempts (started and stopped employment due to diagnosed disability)
 - Long work history, but can no longer work up to SGA (\$1,130/month in 2016) due to conditions
 - Scattered work history due to conditions and other factors